Regional Skills Assessment 2008: Executive Summary

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1 Introduction

The Regional Skills Assessment has been produced on an annual basis since 2005, providing an overview of the changing needs of the region's labour market, along with a detailed exploration of key issues by sector, by sub-region and for key demographic groups. The Assessment is produced on behalf of the Regional Skills Partnership (RSP), which has been established to lead the skills agenda in the West Midlands, defining the major skills challenges the region faces and ensuring that effort is targeted where it will have the greatest impact. Specifically the Assessment provides the principal evidence base for:

- Further iterations of the Skills Action Plan
- Updating of the West Midlands Economic Strategy and the associated Delivery Plan
- The Observatory's State of the Region process
- The skills and labour market elements of the Sub National Review and Single Integrated Regional Strategy
- The annual planning and policy development activity of funders of education and training such as the LSC, HEFCE and AWM

The Assessment also informs the work of organisations providing careers information, advice and guidance, employers in the Region looking to up-skill and develop their workforce and organisations helping individuals to invest in their skills and access employment. Specifically the report includes a high level summary of key skills issues for the region and more detailed analysis relating to:

- Key sectors of the regional economy
- Sub-regions and localities, rural and urban areas
- Key groups and communities, particularly those that are disadvantaged in the labour market

The main report is complemented by six separate sub-regional profiles and an assessment of key skills and labour market issues for the rural West Midlands which is due to be completed in early 2009.

It should be noted that comprehensive data is only available for the period up to 2007, one of significant economic growth. While this analysis identifies a range of long term strategic issues it does not take account of the impact of the subsequent economic downturn. We have included initial analysis where available of the impact of the downturn on skills and the labour market, however and we will be updating the RSP Board on developments on a quarterly basis.

2 Key headlines and conclusions

2.1 Economic context

The performance of the West Midlands economy has historically lagged behind many other regions and latest data on GVA per head, GVA per employee and employment rates[1] shows that this continues to be the case. The relatively limited improvement in the region's economic performance is reflected in trends in employment. While the number of people in employment in the region increased by 3% between 2001 and 2006 (latest available data)[2] this is the third slowest growth in England.

A worsening economic climate, moreover, means that employment prospects are likely to deteriorate in the coming months. The UK economy failed to grow in the second quarter of 2008, bringing to an end a 15 year period of economic growth. In the West Midlands business activity is falling, particularly in manufacturing where falling orders and workloads are already leading to lay offs and redundancies[3].

2.2 A changing labour market

However while the rise in overall regional employment levels has been quite gradual over the 2001-2006 period there has been a significant shift in the balance of employment from manufacturing to services. There has been substantial new job creation in private sector services such as business & professional services, retail and hotels & catering and in public sector services such as health & social care, education and public administration.

But this has been offset by the shedding of significant numbers of jobs in sectors that have historically dominated the regional economy such as engineering (and in motor vehicles and mechanical and electrical engineering in particular) and in other manufacturing industries such as ceramics, clothing and textiles. Competition from China, India and other overseas locations with a lower cost base has led to firms either transferring production or ceasing trading. The worsening economic climate, moreover, is compounding the problem.

[1] Source: ONS Regional Accounts 2006, ONS Labour Force Survey 2007
[2] Source: ONS Annual Business Inquiry 2001-2006
[3] Source: September 2008 economic conditions report: prepared by Observatory for AWM

As a result employment trends have varied widely by sub-region over the last 5 years, reflecting where activity within these key sectors is concentrated geographically. While the overall regional trend is a positive one significant numbers of net new jobs created in Warwickshire and Staffordshire have been offset by significant net falls in employment in urban areas such as Coventry, Dudley, Sandwell, Stoke-on-Trent and Walsall. The exceptions are Birmingham, Solihull and Wolverhampton where employment levels have increased.

Nevertheless across all sectors of the economy the demand for new and up-graded skills has been increasing over the last 5 years. These include technical industry or business-specific skills, more generic leadership, management, planning and organisational skills and 'employability' skills in areas such as basic literacy, numeracy, problem solving, team working, communication and customer service.

2.3 The Region's overall skills performance

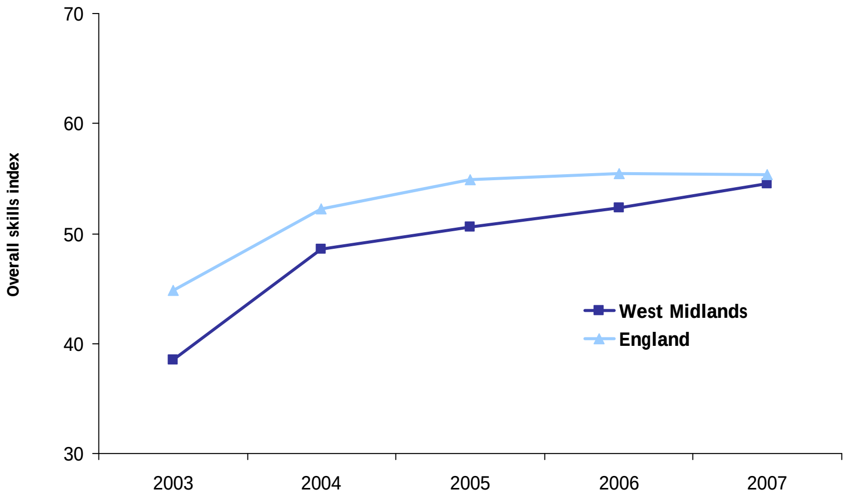
The following sections consider recent trends in the demand, supply and utilisation of skills across the region in response to changes in the labour market.

Skills levels in the West Midlands have historically lagged behind many other regions and the England average. Encouragingly, however, increasing numbers of employers are investing in the training and up-skilling of their staff and increasing numbers of individuals are taking the initiative and acquiring new skills and qualifications.

This is reflected in a strong upward trend in our skills index, which is a summary measure based on a range of indicators of employers' and individuals' investment in skills, closing the gap with the national average[4]. In 2003, there was a 6 percentage point gap between skills performance in the West Midlands and England. By 2005, this gap had narrowed to 4 percentage points and closed further to less than 1 percentage point in 2007.

[4] Five relating to employer issues (investment in training and up-skilling, the incidence of skill gaps, adoption of workforce development tools, the incidence of skill shortages and the proportion of highly qualified workers in the private sector) and five relating to issues for individuals (qualification attainment among young people, qualification attainment among adults, graduate retention, participation in job related training and youngsters participation in education or work based learning)

1 Skills Performance Index



Source: WMRO

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2.4 The size of the challenge

However while the region's overall skills performance has been improving there are still areas where the scale of the challenge to close the gap with the national average, and better performing regions remains, significant (see figure 1). In particular to equal the national average nearly 2,000 more young people need to achieve 5 or more GCSEs at A*-C each year, around 96,000 more working age adults need to achieve at least a level 2 qualification and more than 106,000 need to achieve at least a level 3 qualification. Nearly more than 100,000 working age adults with no qualifications, meanwhile, need to be supported in taking their first step in participating in education and training and achieving qualifications.

The gaps to be addressed in relation to higher level skills are also significant. More than 77,000 more people within the 19+ working age population need to attain qualifications at level 4 or above and more than 67,000 more 'knowledge workers' qualified to Level 4 or above need to be recruited into the region's private sector[5].

[5] For further details see the Observatory annual review of regional skills performance, available for download via http://wmro.org/pageRedir.aspx/227/

Figure 1: The size the challenge

Measure	Position in 2007			Best performing region		Scale of the task - to close the gap	
	West Midlands	England	Rank	Achievement	Region	With England average	With best performing region
Demand issues:							
1. Proportion of staff trained over past 12 months	64%	63%	4th	68%	NE	n/a	7,100
2. Proportion of staff with skill gaps	5%	6%	2nd	5%	Y&H	n/a	600
3. Density of skill shortage vacancies	16%	21%	1st	16%	WM	n/a	n/a
4. Proportion of graduates finding employment in their region of study after graduation	65%	65%	4th	75%	NW	100	1,600
Supply issues:							
5. Private sector employees educated to NVQ Level 4+	24%	28%	6th	42%	Lon	67,200	333,400
6. Proportion of pupils achieving 5+ GCSE A*-C grades (inc Maths & English)	43%	45%	7th	49%	SE	1,800	4,000
7. Proportion of working age population with NVQ4+	28%	31%	6th	39%	Lon	77,300	333,500
8. Proportion of working age population with NVQ3+	46%	50%	8th	54%	Lon	106,500	234,600
9. Proportion of working age population with NVQ2+	67%	70%	8th	74%	SW	96,000	206,200
10. Proportion of working age population with no qualifications	15%	12%	9th	8%	SW	100,800	202,100
11. Proportion of employees who participated in job related training in the last 4 weeks	10%	11%	5th	13%	NE	7,700	84,500
12. Proportion of 16-17 year olds in education or Work Based Learning	81%	81%	4th	84%	Lon	400	4,800

= Worse than national average   = Same as national average (-/+ 1%)   = Better than the national average

2.5 The demand for skills

2.5.1 Investment in training and up-skilling

A key driver of the improvement in the region's overall skills performance has been a strong upturn in numbers of employers investing in the training and up-skilling of their staff between 2005 and 2007[6], for example via participation in Apprenticeships[7] and Train to Gain[8]. There has been a resulting reduction in the gap between the skills required by employers and those available from the workforce, and there has been a sharp fall in the incidence of skill shortages in the labour market. These trends have been given added impetus by the influx of significant numbers of migrant workers since the UK opened its borders to EU accession countries in 2005[9]

It is notable that the impact of these trends has varied significantly across different sectors of the economy, however. For example:

- While the percentage of staff trained by their employer is above the regional average in education, public administration, health and social care, utilities and business and professional services the figure is much lower in agriculture, construction and other manufacturing[10]
- While the proportion of staff with skill gaps has fallen significantly in education, utilities, health and social care and ICT and telecommunications, employers in the engineering, other manufacturing, wholesale and retail and hotels and catering sectors still highlight significant skill gaps within the workforce
- While skill shortage problems have reduced sharply in public administration, utilities, and wholesale and retail a significant proportion of employers in agriculture, engineering, other manufacturing and construction sectors still report significant skill shortage issues

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[6] Source: LSC National Employer Skills Survey 2005-2007
[7] Source: LSC 2008
[8] Source: LSC Train to Gain team 2008
[9] For further details see the study on the economic impact of migrant workers completed on behalf of the LSC and AWM, available via http://wmro.org/pageRedir.aspx/329/
[10] This category includes industries such as ceramics, furniture, clothing & textiles and food & drink

Recent months have seen a slowdown in investment in training, however, as the region's employers have revised their investment plans in the face of a worsening economic climate. The most pronounced slowdown has been among smaller and micro businesses in the manufacturing sector. At the same time, however, recruitment difficulties and skill shortage problems are increasing and investment in workforce training and up-skilling remains critical if businesses are to have access to the skills they need to survive the downturn[11].

[11] Source: West Midlands Chambers of Commerce Quarterly Economic Survey 2008

2.5.2 The higher level skills deficit

There are also key issues to be tackled relating to the demand for higher level skills.

On a positive note the demand for higher level skills from public sector organisations compares well with that in other regions and, as highlighted in section 2.2, sectors such as education and health and social care have been key drivers of employment growth in recent years. Indeed there is potential to further exploit the potential of the public sector as a driver of economic growth. For example as a procurer of goods and services public sector organisations can help local firms survive the economic downturn while universities and the health sector can attract spin-off businesses to the region creating high value employment and increasing innovation and enterprise[12].

Demand for higher level skills from the region's private sector companies, however, is relatively weak. Although the situation is improving year on year, the region still performs poorly in terms of the recruitment and deployment of highly skilled 'knowledge workers'[13].

The low level of demand for higher level skills from the private sector has a significant impact on graduate retention. A significant proportion of graduates leave the region to secure their first job, notably those with a desire to work in better paid, higher skilled and higher value added sectors of the economy[14].

Nevertheless there may be additional *potential* demand for graduate and higher level skills in the region with survey evidence suggesting that significant numbers of businesses are of the view that graduate and other higher level skills could be critical to future business success. There remains a perception among many, however, that some graduates lack both the industry-specific and softer 'employability' skills they require[15].

This creates a 'catch 22' situation for many graduates who have not had the opportunity to develop these skills. While work placements are already proving successful in addressing these issues, effective careers information, advice and guidance is also essential to match graduates with available employment opportunities.

[12] Source: the Work Foundation – Ideopolis II final report, 2008
[13] i.e. employees qualified to degree level or above
[14] Source: Observatory /Ipsos MORI survey of graduates 2008
[15] Source: Observatory /Ipsos MORI survey of graduate employers 2008

To meet the current and potential future demand for higher level skills it will be important to ensure that sufficient graduates are retained and attracted to the region. To this end it will be important to promote a positive image of the region as a place to live and work. Currently graduates' perceptions of the West Midlands as a place to live and work are highly polarised with those who have elected to remain here after completing their studies holding very positive views but those that have left to work elsewhere much more negative. It may be, however, that these perceptions are becoming increasingly outdated as initiatives to regenerate the region begin to have an impact. Indeed a high proportion of those graduates that return now have very positive perceptions of the region.

2.6 The supply of labour and skills

2.6.1 Demographic trends

There have also been significant shifts in the structure of the supply of labour and skills over the last decade. The region's population profile is ageing, especially in rural areas. In many of the region's urban areas, meanwhile, the population is becoming younger and more ethnically diverse[16]. If they are to meet their labour and skills needs in the future employers need to widen their recruitment to include these groups:

- A number of sectors, and hotels and catering and wholesale and retail in particular, have a predominantly young workforce. As in many parts of the region the population is ageing it will be important for employers to widen their recruitment to include older people, many of whom represent a valuable, hitherto under-valued source of labour and skills.
- Conversely a number of sectors, notably education, public administration, health and social work and engineering have an ageing workforce with a significant percentage of staff aged 45+. Many are set to retire in the next few years, taking their skills and experience with them and appropriate recruitment, training and succession planning policies will be vital.
- While the hotels and catering, transport, health and social work sectors employ a particularly significant percentage of people from minority ethnic groups the percentage is much lower in sectors such as education, construction and electricity, gas and water. Changing demographics, particularly in urban areas, mean that employers will need to target them in their recruitment if they are to meet their future employment needs.

[16] Source: ONS mid-year population estimates 2007

2.6.2 Qualification attainment

Another key factor driving improvements in the region's overall skills performance has been considerable improvements in qualification attainment among young people across a wide range of measures. There are significant sub-regional variations in attainment, however:

- While in some parts of the region young people's qualification rates are above the regional and national average, rates in the region's major urban centres, which are characterised by significant education, skills and employment related deprivation are much lower[17].
- While the proportion of young people in the region not engaged in employment, education or training (NEET) is falling and the rate is below the regional and in some cases the national average, it remains much higher in the region's urban centres[18].

There has been an encouraging upturn in the proportion of adults qualified to Level 2 and above and Level 3 and above, with the region's relative position improving from 9th to 8th in the regional league table on both measures[19]. This has been supported, for example, by strong Apprenticeship success rates - the proportion of 16-18 year olds successfully completing apprenticeships in 2007 was the highest in England the figure for adults was the second highest in England[20].

Nevertheless the region still has the highest proportion of adults without any formal qualifications in the country[21]. Low levels of adult qualification attainment are concentrated in the region's urban centres and among disadvantaged individuals, notably among older people and within minority ethnic communities which are accounting for a rapidly growing share of the region's working age population. The gap in attainment between these and better performing groups, moreover, is widening year on year. These trends reflect a number of inter-related factors:

- Significant numbers of NEET young people entering the available for work population
- The out migration of people who gain better skills and qualifications from urban areas to the surrounding 'shire counties'
- Leaving a core population of disadvantaged and hard to reach individuals, which are falling further behind

[17] Source: DCSF 2008
[18] Source: Connexions 2008
[19] Source: ONS Labour Force Survey 2007
[20] Source: LSC 2008
[21] Source: ONS Labour Force Survey 2007

2.7 The deployment of skills

2.7.1 Disadvantaged groups and communities

A lack of investment in relevant skills and qualifications by disadvantaged individuals continues to act as a key barrier to participation in employment and contributes to disadvantage in the labour market throughout adult life. Regional employment rates are falling and remain particularly low in the region's urban areas and among older people and people from minority ethnic communities[22]. Unemployment rates, moreover, have begun to rise in the wake of the economic downturn. Nationally the rise in the number of claimant unemployed between July and October 2008 was the sharpest since 1991 and in the West Midlands the number increased by more than 10,000.

It is particularly notable that employment rates are low in Birmingham and Wolverhampton, where significant numbers of new jobs have been created in recent years. This suggests that a significant proportion of local people in these and other urban areas are marginalised in the labour market. Many localities are affected by a cycle of social and economic deprivation, limited opportunities, low attainment and aspirations. Many wards are among the most deprived 20% nationally in terms of young peoples' and adults' qualification attainment and school absences and staying on rates.

Significant numbers of those within the workforce also lack skills and qualifications and are in an increasingly vulnerable position, notably in engineering and other manufacturing sectors where employers are both shedding lower skilled jobs and demanding new and upgraded skills from their employees in an increasingly competitive market.

2.7.2 Leadership and management skills

While the Region's leaders and managers fulfill a valuable role in promoting innovation and enterprise, they also have a critical role to play in the recruitment, development and development of labour and skills[23]. To this end it will be important for partners to encourage more employers to invest in leadership and management skills to boost business competitiveness, ensure that the leadership and management qualifications funded by the public sector are fit for purpose and better align the supply of skills training and development to address the specific needs and concerns of employers.

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[22] Source: ONS Labour Force Survey 2007

[23] For further details see the leadership and management skills balance sheet analysis the Observatory has produced on behalf of the RSP's Leadership, Management and Entrepreneurship work stream available via http://wmro.org/pageRedir.aspx/402/

2.8 Future prospects

Notwithstanding current economic difficulties, in the longer term the shift in the balance of demand for labour from manufacturing to services and growth in the demand for new and upgraded skills and qualifications are expected to continue. Shifts in the structure of the supply of labour and skills are also expected to continue, meanwhile, with a further ageing of the working age population and further growth in minority ethnic populations in the region's urban areas.

While the improvements in the region's economic performance are expected to continue the West Midlands Economic Strategy[24] and Skills Action Plan[25] call for an ambitious, long term step change in the region's economic and skills performance, with an emphasis on meeting the stretching targets set in the Leitch Review of Skills[26]. By 2020 422,000 more working age adults need to have attained level 1 or above in literacy, 567,000 more need to have attained entry level 3 or above in numeracy, 695,000 more need to be qualified to level 2 or above and 407,000 more need to be qualified to level 4 or above[27].

The scale of the task is particularly significant in a number of urban areas and among the region's disadvantaged groups and communities with regard to the level 2 targets and especially the level 4 targets. For example as already mentioned in section 2.6 some 67,000 employees in the region's private sector need to be up-skilled to Level 4 or above to close the gap with the England average. Of these it is estimated that 80% work in the Black Country (which alone accounts for over 50% of the deficit), Birmingham and Stoke-on-Trent[28].

Indeed, even if the ambition to achieve a step change in skills performance is achieved, the pace of improvement will vary significantly across the region depending on the policy priorities pursued. Unless there is a particular emphasis on improving qualification attainment in disadvantaged areas of the region, those who are already relatively well qualified continue to be most likely to improve their qualification levels and disadvantaged areas and groups will fall further behind.

[24] West Midlands Economic Strategy, 2008
[25] Skills Action Plan for the West Midlands Region, March 2008
[26] The Leitch Review of Skills was commissioned by the Government in 2006
[27] For further details see our Leitch research report, available for download via http://wmro.org/pageRedir.aspx/402/
[28] For further details see 'University Challenge – the region's knowledge economy and the demand for higher level skills, a report produced by the Observatory on behalf of AWM and HEFCE http://wmro.org/pageRedir.aspx/402/

It is estimated that realising the ambitions would result in significant benefits for the regional economy with an increase of one percentage point in the region's employment rate, closing the gap with the UK average and an increase in GVA per employee from a current £35,700 (10% lower than the current UK average) to £37,500 in 2020 (6% lower than the UK average) by 2020. However these benefits are expected to vary widely across the region:

- Increases in employment rates in the region's most disadvantaged areas and communities are forecast to vary significantly depending upon the policy priorities pursued
- Growth in GVA is likely to vary widely by sector. While significant increases in GVA are expected in fast growing, high value added sectors such as IT & telecoms, health & social care, construction, transport, engineering and utilities where shortages of skilled and qualified staff have been a constraint on growth, more modest growth is expected in other manufacturing industries typically dominated by relatively low value-added activity. While businesses already face growing competition from overseas producers with a lower cost base, this is likely to be exacerbated by pressures for higher wages and other costs.

2.9 Conclusions

2.9.1 From an employer perspective

It is encouraging that the region's overall skills performance has improved over the last few years, driven principally by a significant numbers of employers investing in the up-skilling of their staff and feeding onto improved business performance. This has led to a sharp reduction in skill gap and shortage problems. The current economic downturn has led to a slowdown in investment, however and action is needed to help employers to keep up the momentum and ensure that the step change in economic and skills performance required by the West Midlands Economic Strategy and the Skills Action Plan will be achieved:

- Many employers, and small and micro businesses in the manufacturing sector in particular, are faced with falling orders, workloads and turnover and investment in skills is less of a priority. A significant proportion still face skill gap and shortage problems, however, and investment in training and up-skilling remains important in the longer term to help address these.

- It will be important for employers to take up the offer of support with training where it is available. For example, Train to Gain is a service designed to help businesses identify and source the training they need. Recently new flexibilities in the range of funded qualifications have been announced as has further government funding to support businesses with training.
- If they are to meet their business ambitions employers also need to prioritise succession planning and widening their recruitment to include groups accounting for a growing share of the region's working age population such as older people and people from minority ethnic groups.
- Building on existing activity to offer work placement and job matching services will also be critical to unlock the potential demand for higher level skills
- For example the University of Wolverhampton, working with further and higher education partnerships, employers, Sector Skills Councils and the Chamber of Commerce, has developed a strategy to support employers in their efforts to improve their performance by up-skilling their staff and encourage progression to higher level skills. A variety of approaches, including 'bite sized chunks' of learning delivered off and on-site, will help individuals develop their knowledge, improve their skills and enhance their confidence and motivation[29]
- There is potential to exploit the emergence of public sector activities such as education and health and social care as key drivers of economic growth and productivity. For example as a procurer of goods and services public sector organisations can help local firms survive the economic downturn while universities and the health sector can attract spin-off businesses to the region creating high value employment and increasing innovation and enterprise[30]. Lessons can be learned from activity in other parts of the country (notably in cities such as York, Oxford and Cambridge and more latterly Sheffield and Newcastle) where knowledge based public sector activity is increasingly driving economic growth and productivity

[29] Source: Arthur D Little Ltd on behalf of the University of Wolverhampton and the City of Wolverhampton College - Workforce development: Understanding and meeting employers' needs: A study into the demand for i-Central, 2008
[30] Source: the Work Foundation – Ideopolis II final report, 2008

- It will also be important for partners to encourage more employers to invest in leadership and management skills to help them move into higher value added products, services and markets. To this end it will be important to ensure that the leadership and management qualifications funded by the public sector are fit for purpose and better align the supply of skills training and development to address the specific needs and concerns of employers.[31]

2.9.2 From an individuals perspective

While accounting for a growing share of the region's working age population the region's disadvantaged groups and communities perform poorly relative to regional and national trends in terms of participation in education and training, qualification attainment and accessing employment. The scale of the challenge to close the gap with the national average, let alone the better performing regions, and realise the ambitions within the West Midlands Economic Strategy and the Skills Action Plan is significant.

There is a danger that these groups may lag further behind in the future, with those who are already relatively well qualified continuing to be the most likely to invest in their skills and qualification levels. As a result employment rates are likely to remain low in the region's urban centres even where significant numbers of new jobs are being created.

Evidence suggests that participation in education and training and attaining a qualification can play an important part in raising aspirations, breaking the cycle of disadvantage, boosting individuals' confidence and motivation and helping them to move off benefit and into employment[32]. Further action to help those marginalised in the labour market to access education, training and employment, and to tackle the deep seated and often inter-related barriers that they face, is vital. This will both ensure that they share in the benefits of economic and employment growth and to ensure that employers are able to meet their labour and skills needs in the future.

[31] For further details see the leadership and management skills balance sheet analysis the Observatory has produced on behalf of the RSP's Leadership, Management and Entrepreneurship work stream available via http://wmro.org/pageRedir.aspx/402/

[32] Source: Impact of learning on employability in the West Midlands City Region – LSC/Centre for Economic and Social Inclusion, 2008

For example Jobcentre Plus and the LSC are working together to deliver an integrated package of support around careers advice and guidance, training and skills development and access to employment service to unemployed and low skilled individuals in the region. The Integrated employment and skills programme, being trialed in the region from the end of September 2008, aims to break the common cycle of unemployment, low skilled work and back to unemployment many individuals are locked into. There is a particular focus on the City Region and 55 priority wards that account for 42% of the Region's unemployment via the City Strategy Pathfinder.

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